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ABSTRACT

Intended for state team members developing state-wide collaborative agreements between education and rehabilitation agencies to aid in the transition of blind and visually handicapped students (ages 16-25) from school into the work force, the manual arose out of the February, 1985, Institute. The first chapter provides perspectives on transition and collaboration with sections on such topics as parents, teachers, statements on transition from the Office of Special Education and Rehabilitative Services, and the broader transition model of Andrew Halpern (1985). Collaborative planning as a systematic process is examined next in a discussion of necessary conditions (such as voluntary and democratic nature, time investment, and systematic planning) and team building. The actual process is discussed in the third chapter and consists of three stages: (1) establishing state transition needs and goals, (2) choosing strategies, and (3) developing an action plan. The fourth chapter provides key concepts for critiquing the planning process as well as comments and changes made in the process as a result of feedback from Institute participants. Appended are a list of the National Advisory Committee members; worksheets prepared at the Institute by team members from Colorado, Kansas, Michigan, and Virginia; and a list of the state team members. (DB)

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COLLABORATIVE PLANNING: TRANSITION FROM SCHOOL TO WORK

DEVELOPING YOUR STATE TEAM: WHY AND HOW

NATIONAL LEADERSHIP INSTITUTE
FOR PERSONNEL IN EDUCATION
AND REHABILITATION OF THE
BLIND AND VISUALLY HANDICAPPED

Sponsored by
The American Foundation for the Blind

Project Coordinator:
Ferne K. Roberts
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Project Directors:
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National Consultant in Education

Frank Simpson
National Consultant on Employment

Funded in part by:
Rehabilitation Services Administration
Office of Special Education and
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United States Department of Education

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Transition From School to Work

Developing Your State Team: Why and How

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September, 1985

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Purpose

This manual is provided to all state team members of The American Foundation for the Blind Transition Project "National Leadership Institute for Personnel in Education and Rehabilitation of the Blind and Visually Handicapped."

Its purpose is to provide team members guidance in developing and implementing their collaborative plans. Team members are requested to provide the project staff with feedback as to the manual's strengths and weaknesses.

OVERVIEW 1984-85

All activities during Year One (1) of the American Foundation for the Blind (AFB) National Leadership Institute were structured to facilitate achievement of the project goal which is:

> "To develop collaborative state-wide agreements between education and rehabilitation agencies that will facilitate the movement of blind and visually handicapped students from school into the work force."

In November, 1984, the National Advisory Committee (see Appendix A) for this project met in Washington, D.C. to review plans and make recommendations for modification of the proposed project design. While the original goal remains unchanged, the scope was modified.

The program of the National Leadership Institute was balanced to include presentations of four currently existing model transition programs; a session on the "mechanics" of agreement building; and training in the actual use of a collaborative planning model.

A total of 265 people registered for the Institute. Of this number, 97 were team members who received stipends. Parent and consumer participation was critical to each team's planning. They were key elements in the success of the Institute. While transitional planning may have occurred in the past, the Institute was unique in giving parents and consumers equal roles with professionals.

Each state team was required during the Training Institute to use the planning model provided by the project staff to document existing collaborative agreements; identify needs relative to transition; identify strategies; identify tasks; and develop an action plan. The results of their efforts are outstanding. Each state plan has been reviewed and critiqued by Project Staff with written feedback provided to each Team Member. In addition, regular telephone contact has been maintained with many state team members.

The overall objective of transition team development was initiated at the Leadership Training Institute. The structured planning process facilitated this development and is a vehicle to be used by each state team for their on-going work. While the action plans varied, needs commonly identified can be categorized as follows:

1. Further team development, including the addition of members to represent employers and private agencies.
2. Initiation of state-wide studies to document transition

needs of the target population.

3. Further identification of existing resources and agreements.
4. Program development to provide training opportunities for the target population.
5. Development of a more effective state-wide communication system for sharing information.
6. Funding for further team development; state-wide meetings on transitional planning; and program development.

In addition to written follow-up, project staff have been present at state transition team meetings in California, Washington, Colorado, Texas, New York, and North Carolina.

While the effectiveness of State Teams varies, the immediate impact of several teams has been dramatic. For example, the State Team from Washington has refined its action plan and submitted it to state-level administrators in rehabilitation and special education. The Institute planning process is also being considered for use in planning for transition programs for other low-incidence populations in Washington.

The Team from Colorado has developed a transition plan which was presented to professionals and consumers at a state-wide meeting in May. This plan will have the current State Team coordinate the development of Regional Transition Planning Teams throughout Colorado. The State Team will provide training and on-going support to the Regional Teams. This will facilitate local

planning and will accommodate local transition needs.

While the spirit and enthusiasm of the Institute participants are difficult to capture on paper, their evaluation reflects their approval. Evaluation of the National Leadership Institute by participants is being completed in two phases. Phase I was carried out at the close of the Institute in Washington, D.C. A questionnaire was distributed to participants. A total of 158 were returned, of which 87 were from State Team members. When asked whether the Institute met 13 specified objectives, the respondents overwhelmingly agreed or strongly agreed that it had. Please see the following page for a chart which reflects participant appraisal of the Institute (Figure 1).

The 1986 Institute will continue the momentum initiated at the February, 1985, Training Institute. Project Staff will make modifications based on participants' evaluations and the recommendations made by the National Advisory Committee (See Appendix A).

Figure 1

Results of Evaluations Submitted by 1985 Institute Participants

	Percentages of Participants who:	
	Disagreed or Strongly Disagreed	Agreed or Strongly Agreed
Opportunities for sharing:		
1. Organizational Perspectives	5.06	94.94
2. Personal Perspectives	8.86	91.14
3. Information about existing transitional services	3.87	96.13
Helped to identify:		
4. Unmet Transitional needs	13.38	86.62
5. New programs to meet transmitted needs	8.28	91.72
6. New linkages	17.72	82.28
7. Organizational resources	14.01	85.99
Opportunities to plan:		
8. Use of key persons	16.88	83.12
9. Long-term collaborative relationships	13.25	86.75
Methods and materials:		
10. Provided a method to continue community-wide efforts	17.83	82.17
11. Process helped in development of action plan	12.14	87.86
12. State team worked productively	6.72	93.28
13. Workbook, worksheets, and team meetings should be used again next year	7.86	92.14

	Poor Fair	Good Outstanding
Institute arrangements		
1. Program Organization	14.48	85.52
2. Location	5.48	94.52
3. Accommodations	8.33	91.67
4. Institute Planning	13.29	86.71

I. PERSPECTIVES ON TRANSITION AND COLLABORATION

Introduction

Madeleine Will (1984), Assistant Secretary of Education, Office of Special Education and Rehabilitative Services (OSERS) describes transition as. . .

> "a period that includes high school, the point of graduation, additional post-secondary education or adult services and the initial years of employment. Transitions are an important part of life. Roles, locations, and relationships change. We must adapt."

This focus is clearly on the ages of 16-25 years when young adults are moving from school to work. The years of late adolescence and early adulthood are a time for decision making and assumption of new responsibilities. There is a shift from the role of student to that of worker. For all youth, disabled or non-disabled, this time of transition is exciting and stressful. For disabled youth, movement from special education (an entitlement system) to vocational rehabilitation (an eligibility system) can be particularly stressful.

Visually Impaired Youth

Visually impaired youth are faced with many new risks during the transition period. They are often asked and ask themselves, "What are you going to do when you finish school?" A more

appropriate question would be, "What are you going to do before school is over to prepare for your career?"

Often visually impaired students receive excellent academic preparation in educational programs but have limited social and career development experiences. Time to think about the future may have been limited by the need to devote much time and energy to meeting the daily demands of school and community activities. Visually impaired youth often do not have the time for after school or summer employment. The hours that teenagers often spend in summer or part-time jobs are filled with specialized instruction in: orientation and mobility; communication skills; social skills and remedial academics. The result is that school and work place experiences are totally separate.

Questions visually impaired youth frequently ask relative to the time of transition are often unanswered by parents, teachers, and counselors. These may include:

What can I do? What do you expect me to do?

Should I disclose my disability on my job application?

Should I tell an employer I have low vision?

How do I explain my visual loss to co-workers?

Do I explain how I use non-visual aids to independently travel or do certain job tasks?

Who will pay for the special equipment I might need?

Why do I have to go to a rehabilitation center?

How do I find out about my vocational aptitudes or abilities?

How do I find an apartment? Where will I live?

How do I deal with my employer's and co-workers' negative or over-solicitive attitudes?

How can I change another person's attitude toward me?

Not surprisingly, many of the questions asked by disabled youth relate not just to specific work skills but to personal and social interactions. Disabled adults are often overlooked as primary sources for this information. Students are seeking for personal contact to be able to ask, "You've made it! How did you do it?"

Parents

One parent has referred to the period of time during the change from special education to the adult world as Transition Trauma. Parents' time to think about their disabled child's future is also limited because of the need to focus on the present: finding the most appropriate educational programs; securing special services; maintaining required on-going medical services; remaining equally available to siblings and family members; dealing with managing the home; earning a living; and countless other daily activities consume all available time and energy.

Parents are asking:

What can my child do?

Where will he/she live when I am no longer around?

Where do blind people work?

When is my child assigned a rehabilitation counselor?

Is the school going to provide vocational training?

When does mobility training begin?

I understand the I.E.P. but what is an I.W.R.P.?

Who can help my child find an after school or summer job?

I would like to help during this transition time, but where can I get more information about resources?

What are the options?

My child is in a public school education program, will he/she be able to work in the competitive job market?

Does transition apply just to employment? If so, what about my multi-handicapped son or daughter who needs a group home?

Teachers of Visually Impaired Youth

Teachers of visually impaired students are responsible for providing instruction in skill areas unique to the handicaps imposed by limited or lack of sight. They are also responsible for adapting curricula, techniques, strategies, and materials used in regular education so that programs are appropriate and the environment is accessible.

Teachers react to the recent focus on transition with the following questions:

How can the emphasis on work begin at age 16? Isn't that too late since career development should begin very early?

Can my students benefit from career education programs that have not been designed for visually impaired students?

Where can I find out what experiences, both in the classroom and community, will best prepare my students to be successful

in the adult world of work?

How soon can or will a rehabilitation counselor begin work with my students?

What do the parents expect me to do in preparing their children for transition?

What does the rehabilitation service agency expect me to do in preparing my students for their program?

How can I meet with the rehabilitation agency personnel if my supervisor will not give me release time?

I'm interested, but where do I find time to take on these new responsibilities?

How can I get my students into work experience programs like the ones their sighted classmates are in?

Is funding available to start a work-experience program?

Rehabilitation Counselors

The role of counselors and administrators is to coordinate a service delivery system where the primary emphasis is on preparing an individual for employment. While the current rehabilitation process is vocationally oriented, many of the services address work-related community, personal, and social adjustment needs. The visually impaired student, while often known to the rehabilitation agency, is usually accepted as a client for services at 16-18 years of age.

Rehabilitation counselors often ask the following questions:

Who is responsible for coordinating transitional planning?

What do parents, teachers, and students understand about vocational rehabilitation in our state?

I am very interested in working with students but where will I find the time since I already have a large caseload?

Should not the schools, day and residential programs, be

providing career/vocational training and guidance?

Is there special funding for transitional services?

Though transition is a new focus, haven't we been providing these services for some time?

How does supported employment relate to transition?

OSERS on Transition

The Office of Special Education and Rehabilitative Services (OSERS) (Will, 1984) states the following three assumptions regarding transition:

1. OSERS assumes that students in transition from school leave a somewhat organized provider system and enter a more complex and confusing world. Effective transition requires that relevant community opportunities and service combinations be developed to fit individual circumstances and needs.

2. The focus is on all students with disabilities; an estimated 250,000-300,000 special education students leave school each year. Rather than focus on the many different types and levels of disabilities, focus is on the service needs of these individuals, identifying those that will assist in the transition from school to working life.

3. Sustained employment represents one important outcome of education and transition for all people. Employment is a critical aspect of our life, whether it involves highly paid career specialization, entry level jobs or working in situations where on-going support services are provided. This perspective does not neglect social, personal, or leisure roles. Employment

offers opportunities to expand social contacts, contribute to society, demonstrate creativity, and establish an adult identity. It expands one's range of available choices. The OSERS model includes three types of transition services to aid entry into the labor market.

1. No special services other than those available to the population at large.
2. Time limited services which lead to independent employment at the end of services.
3. On-going services for individuals who will move to supported work roles.

Halpern's Model

Andrew Halpern (1985) offers a modification of the OSERS model of transition. He discusses the complex needs of adolescents and adults with disabilities and the equally complex service delivery systems. He indicates that while the ultimate goal of employment is important, living successfully in one's community should be the target of transition services. Three equally important dimensions of community adjustment include residential living environment, employment, social and interpersonal networks.

Halpern's model is more inclusive, encompassing many services currently available in special education and vocational rehabilitation. Interestingly, many questions from parents and students about transition relate to housing and social/interpersonal issues.

Summary

Perspectives and expectations relative to transition obviously vary among parents, consumers, government officials, special education, and rehabilitation personnel. While the federal government recommends that state-level offices of vocational rehabilitation and special education develop cooperative agreements, this has occurred with varying degrees of success. Many visually impaired students with the support of parents, teachers, and rehabilitation counselors have successfully made the transition from school to work; unfortunately, many have not. The primary goal of this leadership training effort is to enable each State Team to develop and implement collaborative action plans for the transition of visually impaired youth from school to work. This focus on collaborative planning was selected based on the following:

1. Collaborative planning should be based on state-level policy, not just personalities, and individual and/or agency interests.
2. Visually impaired students and adults, parents, teachers, and rehabilitation counselors often have few opportunities to meet and plan together.
3. With parent and consumer input, collaborative planning is more realistic.
4. As financial resources diminish, collaborative planning becomes more critical to maintain quality services for visually impaired youth in transition.

5. With success in collaborative planning relative to transition, other meaningful planning based on consensus is more likely to occur.
6. Coordination, while important, is different from collaboration which involves the merging of various services and perspectives into a <u>new system</u> designed to meet each individual's transition needs.

II. Collaborative Planning As A Systematic Process

Introduction

Fortunately many special education and rehabilitation service programs have initiated collaborative planning to assure that the following positive results occur (Ferrini, Matthews, Foster, and Workman, 1980a, p.3).

1. Sharing of agency/organizational perspectives.
2. Sharing of information about services currently offered.
3. Identification of most critical unmet needs.
4. Identification of new programs and of new linkages between existing programs.
5. The development of long term collaborative agreements among individuals, agencies, schools, and the business community.

Unfortunately many parents, students, and consumers are adversely affected by the fact that rehabilitation and special education professionals do not collaborate. Some of the results are:

1. People "falling between the cracks" because they don't fit the existing system;
2. inadequate referral networks;
3. fragmented services;
4. conflicting expectations and perceptions;
5. inefficient use of resources; and
6. competition among organizations for clients and money.

The American Foundation for the Blind transition project staff reviewed various planning models and selected The Interdependent Community: Collaborative Planning for Handicapped Youth (Ferrini et al., 1980a) as the most appropriate for State Team training. While this model was developed in 1980 before transition

became a federal priority, it is flexibile and easily modified to accommodate planning to meet transition needs on state, regional, and local levels. The design and many of the steps are similar to other models which are currently used. Therefore application to this format is relatively simple.

Conditions for Collaborative Planning

Marie Kovesci, Florida team member representing education, cited four key factors essential for successful planning and team development:

COOPERATION

COORDINATION

COLLABORATION

COMMITMENT

As the following conditions identified by Ferrini et al., (1980a) for successful collaboration are reviewed, application to individual states and communities should be made.

1. Collaboration should be voluntary. In other words, participation in collaborative efforts should be based on a willingness to work cooperatively toward a common goal, often with the realization that some concessions may need to be made during both the planning and implementation processes. Roadblocks to forming and implementing collaborative plans must be openly discussed and circumvented. Each agency must be committed to the overall objective. Voluntary participation encourages motivation, cooperation, and follow-through of action plans.

2. Collaboration should be democratic. All organizations,

agencies, and individuals must be equal partners. No one organization, etc., should dominate meetings. Strategies can be applied, such as structured time limitations for each perspective to be presented. Each participant should participate equally in developing plans, providing meeting facilities and resources.

3. Collaboration Requires a Considerable Time Investment. Collaboration requires a continuous and considerable investment of time. This may represent a new effort by many agencies to bridge organizational barriers among themselves as well as with parents and consumers. If there has been a history of "non-cooperation," time will be required to build an atmosphere of trust. This can be initiated through various team building strategies. Individuals may need the time to gain the support of their organizations and the community.

4. To Overcome Barriers, Collaboration Requires an Interactive Process Facilitated by an Impartial Leader. An impartial leader can structure opportunities for team members to discuss their differences. The leader must encourage mutual understanding of varying perspectives. Compromises will need to be reached frequently in order to realize the overall goal. A voting procedure may need to be implemented as well.

5. Collaboration Requires Systematic Planning. Organizations and individuals involved in collaborative planning need a clearly organized step-by-step process that serves as an on-going guide. Often human service organization staff members and parents find themselves reacting to crises or emerging issues. This need to

react quickly can be essential; however, without a system or framework the results can be fragmented and incomplete. Though perhaps simplistic, think of the crisis team in a hospital that responds to emergencies. The response is organized with each person knowing the role he or she must play to achieve the needed results.

To meet short-term transition needs of visually impaired youth such a reactive response may be appropriate. However, a pro-active approach, which is constructively and systematically developed in anticipation of potential needs, will better serve visually impaired youth. Preparing children in the elementary grades for later transition requires such a proactive approach. As you use this collaborative planning model, evaluate its usefulness for both reactive and proactive systematic planning.

Building The Team

To be effective, the core team should be limited to eight to ten members plus a team leader. Consider who to include on the team. Review which individuals or organizations in the state or community have distinct perspectives on the needs of visually impaired youth in transition. Consider which agencies will be crucial to youth during their transition. These agencies must be involved. Ferrini et al., (1980a) suggest that the following sectors be included: public secondary schools; service organizations serving the handicapped; government agencies; and business firms and associations.

Due to funding limitations, AFB chose to include on the state transition teams individuals from the following four sectors:

1. Parents of visually impaired youth,
2. Consumers who are visually impaired,
3. State-level special education administrators, and
4. State-level vocational rehabilitation administrators.

There are many limitations in only having the above groups represented. To add balance to the team it is suggested that other perspectives be represented by:

1. Private schools;
2. Private rehabilitation agencies;
3. Business, industry, and trade associations; and
4. University training programs.

Interestingly, as several teams have begun the process of defining state transition needs, other types of organizations and agencies have been identified as possible team members. Each addition should be considered and the potential benefits carefully weighed. Decisions should be cautiously made since many agencies may serve as resources to the team rather than as team members or assist the team to develop strategies and tasks into a plan of action. For example, perspectives and expertise may be needed to address concerns about housing, transportation, recreation, low-vision, technology, funding, etc.

A major criterion for membership on State Teams is that adminis-

trators have decision-making power and the ability to commit resources. If the chief administrator is too busy to actively participate, the staff member representing the agency needs to keep the administrator informed and must have his/her full support. Several teams have had changes in membership with administrators designating staff to assume this planning responsibility. While this may be necessary, it can impede the team's progress and the implementation of the action plans.

The commitment of time from all team members is essential. In addition to the initial commitment to participate in the training at the Transition Leadership Institute, time is required to continue planning, implement plans, and evaluate efforts. With success in the initial collaborative planning effort, this model can serve as a vehicle for future efforts, not only at the state level, but also local and regional levels.

III. The Actual AFB Collaborative Planning Process 1984-85

Introduction

Often when presented with this type of step-by-step process, team members may feel it is too simple. This simplicity is one of the basic strengths of a straightforward model. Complicated planning and a convoluted process can often result in confused, unworkable results. The training model developed by Ferrini et al., (1980a) was originally designed to take approximately 25 hours. Of necessity, at the Transition Institute the time was abbreviated and the process modified.

AFB Collaborative Planning

The following discussion of collaborative planning represents guidelines for using the AFB modified process and worksheets. These were used at the Transition Leadership Institute (February, 1985).

STAGE #1. STATE TRANSITION NEEDS AND GOALS

A. Team Members

As individuals introduce themselves, an opportunity is provided to share various roles and perspectives. This may be the first opportunity for parents and consumers to interact with administrators on the topic of transition (Ferrini et al., 1980a, p. 16).

B. Identify Existing Collaborative Programs/Agreements Relative to Transition (Local And State-Wide) And Indicate The Level Of Implementation.

Each team member is asked to prepare, before the initial meeting, listings of any known programs and collaborative agreements relative to transition regarding any special population. Both privately and publicly funded programs should be listed. The list will need to be updated. Often agencies and schools are not informed of existing collaborative agreements between or among other agencies and schools within their state, region, or local communities.

C. List Transition Needs Identified Within Your State.

In a systematic manner the team leader needs to recognize each member in order, recording or listing the needs each person identifies. Team leaders should not distort the intent of statements made by members. As the transition needs are identified, be as specific as possible indicating if they relate to all visually impaired youth or specific sub-groups, (i.e. multiply handicapped, gifted, low-vision, etc.) Listening to each other is not only a learning experience but may also stimulate team members to identify other needs. Continue this process until all team members agree that the list covers the spectrum of transition needs of visually impaired youth.

In reviewing the list, the leader should clarify the needs to see if team members are confused by jargon, definitions, population, etc.

D. Select Three Of The Transition Needs From The List Which The Team Identifies As The Highest Priority.

In a systematic manner, each team member should be allowed time for the discussion of the priority need felt to be the most important. The team leader must monitor this process allowing all members equal time for discussion of their priority need.

From the list of "advocated needs," develop a new list identifying the three top priorities. Indicate the team member who supported each priority.

E. Develop A Realistic Goal For The State-Wide Transition Plan That Will Encompass The Three Priority Needs.

The key word in this step is realistic. An overly ambitious goal is less likely to be achieved. The team needs success in using this collaborative planning process in order to gain and sustain momentum. Success breeds success!

STAGE #2. CHOOSE STRATEGIES

A. Brainstorm a wide-range list of strategies that might be used to achieve the goal the team has identified. A strategy is a particular approach to achieving the goal

the team has developed. Brainstorming should be an open-ended, creative process with each member in consecutive order, suggesting strategies. The only limits should be that these strategies address the focus of transition as it relates to visually impaired youth. The leader should assist in making the strategies as specific as possible (Ferrini et al., 1980b, p. 14-15).

B. Identify the criteria to be used to select the team's preferred strategies. For example, should you select the strategy that will impact visually impaired students but will require aditional state funding or new funding? The discussion may focus on the immediate program needs as well as long term needs of visually impaired youth. Once again, be realistic (Ferrini et al., 1980b, p. 16).

C. Based on the criteria you developed in Step B identify preferred strategies from Step A. This is another opportunity to have team members express their individual preferences and then reach consensus.

D. For each of the strategies identified in Step C, have team members discuss the advantages and disadvantages of each. Based on the discussion identify one strategy that the state team can develop into a viable plan for action (Ferrini et al., 1980b, p. 17-20).

STAGE#3. DEVELOP AN ACTION PLAN

A. List all major tasks necessary to implement the team's chosen strategy.

B. Identify the order in which the tasks should be undertaken. Assign dates for initiating and completing each task.

C. Select other possible members to be added to the state team. This may be one of the first tasks since the team of four people may be unable to undertake all of the necessary assignments or you may be missing a crucial representative. (The team may decide to identify needed resource people in addition to new team members. Resource people are those whom the team may need to consult for specific tasks.)

D. Describe how and when your team will monitor its activities. This monitoring may be through conference calls, quarterly meetings, correspondence, etc. In other words, how will you continue to be active and work together?

E. Prepare an ACTION PLAN. This action plan is a record of past work and a proposed strategy for future work. The action plan includes the following components (Ferrini et al., 1980b, p. 24-30):

1. Description of the team, its members, its history, and its overall focus.

2. Statement of the team's goal (developed in STAGE ONE based on identified needs) with brief explanation.

3. Statement of the team's initial strategy (developed in STAGE TWO) with brief rationale.

4. Statement of the major tasks the team will perform and the timetable (developed in STAGE THREE).

5. Projected date for implementing the team's strategy.

Model State Plans

The Action Plans of four state teams, developed at the February, 1985, National Leadership Institute have been selected as examples of workable schemes: Colorado, Kansas, Michigan, and Virginia. (See Appendix B). Each of these has somewhat modified its original plans but has used them as the basis for successful activities in the months following the Institute. It will be noted that, using the same planning process and work materials these four state teams arrived at very different programs, strategies, and tasks which relate to their unique state needs and resources.

AFB project staff has attended some of the team meetings in two of the above mentioned states and has received reports of activities in the remaining two. These states are to be commended for their commitment to collaboration! Copies of these action plans were also included in the continuation application to OSERS for grant funds for the 1986 AFB Leadership Training Project on Transition. These action plans are presented as examples to illustrate the use of the Institute's planning process and the desirability of keeping plans realistic and achievable. It is now appropriate to refer to Appendix B and review the state team worksheets of the above mentioned states.

IV. Critique of the Planning Process

Participants attending the Transition Leadership Training Institute were asked to provide feedback relative to the planning process. Based on their comments some additional modifications of the design are suggested below.

Key Concepts

Key concepts to consider to meet the state's needs are as follows:

1. Keep team size manageable.
2. Keep team membership representative of all perspectives.
3. Select a team leader who can provide impartial leadership and assume primary responsibility for follow-up with each team member. This requires a considerable time commitment.
4. Identify individuals and agencies you may need as resources for specific tasks rather than team members.
5. Eliminate as much jargon as possible in delineating needs, strategies, and tasks. Be sure all team members have a clear understanding of all content.
6. Keep the planning process time-limited and on-task. This promotes more effective use of time and keeps the meeting from deteriorating into a gripe session or soap box situation.
7. Keep strategies and tasks simplistic and realistic to enhance the likelihood of success.
8. Document all team efforts in order to track progress.

9. Though initially somewhat "artificial," following and using the process over time will become natural. Persevere!

Team Member Comments

Representative comments provided by the first group of Institute participants are as follows:

"MAINTAINING THE PLAN WILL ASSURE ACTION TO TAKE PLACE."

"GOT US TALKING IN SPECIFICS. GUIDELINES WERE HELPFUL."

"THE INTERESTING ASPECT OF THIS WAS THAT IT (THE PROCESS) CAN BE USED IN MANY SITUATIONS."

"OUR GROUP SEEMS TO HAVE ESTABLISHED WAYS OF LINKING AND FUNCTIONING."

"ALTHOUGH WE DIDN'T ARRIVE AT ANYTHING TERRIBLY CREATIVE, IT DID ALLOW US TO FOCUS ON THE ISSUES."

"PRINTED MATERIALS WERE HELPFUL. PROCESS WAS HINDERED ONLY BY THE UNWILLINGNESS OF SOME TEAM PLAYERS TO ACCEPT THE CHARGE!"

The Proposed AFB Collaborative Planning Process (1985-86)

Specific aspects of the AFB Collaborative Planning Process have been modified based on input from the first Transition Institute's team members as follows:

Stage #1: State Transition Needs and Goal

A. Team building

B. Identify Existing Collaborative Programs/Agreements

C. List transition needs within your state

D. Select three of the needs as the highest priorities

ADD E. SELECT THE ONE HIGHEST PRIORITY NEED

F. Formulate a realistic goal based on the highest priority need.

Stage #2: Choose Strategies

A. Brainstorm a wide-ranging list of strategies that your team might use to meet the priority need.

CHANGE NEED (INSTEAD OF GOAL).

B. Identify the criteria to be used to select your team's preferred strategies.

C. Based on the criteria developed in Step B identify preferred strategies from Step A.

D. Identify one strategy that your team can develop into a plan of action.

Stage #3: Develop an action plan.

A. List all major tasks necessary to implement your team's chosen strategy. One of these tasks is to identify additional team members crucial to

NO meeting the state team goal; resource people should

CHANGE also be identified to be used as consultants for specific tasks.

V. Summary

Review your initial thoughts on transition prior to the Institute. Reflect on your experiences in planning with other individuals and organizations. Consider the many visually impaired youth you know who are anxious and excited as they approach adulthood.

Now with representative input, a systematic process, realistic goals, and community support, your current collaborative planning efforts will contribute significantly to the transition of these youth.

Several perspectives were reviewed at the beginning of this manual. The AFB Trasnition Project staff acknowledge and endorse the emphasis on school to work; however, we encourage you to consider Halpern's, (1985, p. 481) more inclusive design which is reproduced below:

Halpern's revised transition model depicts a movement from high school to community adjustment. Participating as completely as possible in one's residential environment; employment setting; social and interpersonal networks constitute community adjustment.

AFB Transition Project staff thank you for your commitment and your enthusiasm. We have had active correspondence with seventeen state teams and no input from the remaining teams. While we are sure every team remains committed to the development of collaborative planning, we need your on-going input. We learn from your efforts and, in turn, can share your experiences with others.

Currently an opportunity exists to be creative and cross some of those old turf boundaries. We have an obligation to strive to develop a more meaningful, effective service delivery system in order to meet each individual's transition needs.

References

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Halpern, A.S. (1985). Transition: A look at the foundations. Exceptional Children, 51, 479-486.

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Appendix A

National Advisory Committee

National Leadership Institute
for
Personnel in Education and Rehabilitation
of the Blind and Visually Handicapped

Transition from School to the World of Work

Advisory Committee

Mr. Michael Byington
706 Buchanan
Topeka, KS 66606
913-233-6323 (office)
233-3839

Mrs. Ruth Migliorelli
986 Peace Street
Pelham Manor, NY 10803
914-738-3350

Mr. William T. Coppage, Commissioner
Virginia Department for the
Visually Handicapped
397 Azalea Avenue
Richmond, VA 23227
804-264-3140

Dr. J. Elton Moore, Director
Mississippi Vocational
Rehabilitation for the Blind
P.O. Box 4872, 5455 Executive Place
Jackson, MS 39216
601-354-6411

Dr. Richard L. Welsh, Superintendent
Maryland School for the Blind
3501 Taylor Avenue
Baltimore, MD 21236
301-444-5000

Federal Liaison

Mr. Chester Avery, Director
Division for the Blind and
Visually Impaired
Rehabilitation Services
Administration
U.S. Department of Education
330 C Street, S.W., MES 3216
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202-732-1316

Mrs. Toby Hollin-Lawrence, VR
Program Specialist
Rehabilitation Services
Administration
Office of Special Education
and Rehabilitative Services
U.S. Department of Education
330 C Street, S.W., Room 3321
Washington, DC 20202
202-732-1351

Dr. Richard Champion
Division of Personnel Preparation
Department of Education
400 Maryland Avenue, S.W.
Washington, DC 20202
202-732-1158

Dr. Richard Melia, Rehabilitation
Research Analyst
National Institute of Handicapped
Research
Department of Education, MES 2305
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Rehabilitation Program Specialist
Rehabilitation Services Administration
Office of Special Education and
Rehabilitative Services
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330 C Street, S.W., Room 3323
Washington, DC 20202
202-732-1349

Appendix B

State Team Worksheets

Colorado

Chairperson: John Morrison

Recorder: Charles Wright

Collaborative Planning
A Model Process for Developing a State-Wide Plan

Based on: Ferrini, Matthews, Foster, Workman. The Interdependent Community: Collaborative Planning for Handicapped Youth. Technical Education Research Center, 44 Brattle Street, Cambridge, Massachusetts 02138

Worksheet #1: State Transition Needs and Goal

A. Team Members:

1. Chairperson's Name: John Morrison

Title: President PAVIC

Address: 817 Hamal Dr.

Littleton, CO 80124

Work Telephone: 303-850-3103

Home Telephone: 303-799-0043

Consumer _____ Education Specialist _____

Parent X Rehabilitation Specialist _____

2. Name: Chuck Wright

Title: Education Consultant

Address: 1362 Lincoln St.

Denver, CO 80203

Work Telephone: 303-866-2181

Home Telephone: 303-341-0139

Consumer ____ Education Specialist X

Parent ____ Rehabilitation Specialist ____

3. Name: Patti Jacobsen

Title: Rehab. Counselor II

Address: Div. of Rehabilitation

800 8th Ave. Suite 121, Greeley, CO 80631

Work Telephone: 303-353-5750

Home Telephone: 303-353-8260

Consumer X Education Specialist ____

Parent ____ Rehabilitation Specialist ____

4. Name: Ken Schmidt

Title: Administrator-Services for Blind & Deaf

Address: 1575 Sherman

Denver, CO 80203

Work Telephone: 303-866-5092

Home Telephone: 303-423-7194

Consumer ____ Education Specialist ____

Parent ____ Rehabilitation Specialist X

5. Observers (names only)

a. Dean Stenehjem

b. Grace Napier

c. Dean Tuttle

d. W. Buck Schrotberger

e.

6. AFB Staff in Attendance (names only)

a. None

b.

c.

B. Identify EXISTING COLLABORATIVE PROGRAMS/AGREEMENTS relative to transition (local and statewide), and indicate their level of implementation.

		Implementation	
		Partial	Total
1.	Inter-Agency Agreement CYP-Cooperative Youth Program	X	
2.	Adjustment Program	X	
3.	VISERV		X
4.	Cooperative Volunteers-Media Preparation (State Library)	X	
5.			

C. List transition NEEDS identified within your state (for example, vocational training, career education, employment, transportation, housing, medical services, etc.)

1. Career Awareness-Opportunities (on-going)
   Career fair (Day to Day)
2. ~~Utilize Business Community~~
3. ~~Inter-Agency Agreement-Vehicle for Communication~~
   ~~(CYP-Specifically Addresses VI Students)~~
4. Consumer Groups-VI Workers
   (Independent Advisory Council members)
5. Independent Living Skills
6. Lions Summer Camp
7. Summer Program-(MOU with Dist.#11 in Co.Sps. & CSDB
8.
9.
10.

D. Select three of the transition needs from the above list which your team has identified as the highest priorities for your state:

1. Development of Independent Living Skills

2. Inter-Agency Agreement-State & Local levels

3. Vocational Needs-Career Awareness-On-Going

E. Develop a realistic goal for a state-wide transitional plan based, if possible, on your team's three prioritized needs.

Goal: We believe individuals associated with VI in Colorado will commit to the development of independent living programs, career awareness, and agreements that will lead to transition for the blind and visually impaired.

Congratulations, you have completed the first worksheet.

STATE: Colorado

Chairperson: John Morrison

Recorder: Charles Wright

Collaborative Planning
A Model Process for Developing a State-Wide Plan

Worksheet #2: Choosing Strategies

A. Brainstorm a wide-ranging list of strategies that might be used to achieve the goal you identified in Workshop #1 (e.g. conduct workshops for teachers, rehabilitation personnel, employers, and parents on employment opportunities for multiply handicapped-visually impaired persons.)

1. VISERVE - Panel Presentation
2. Summer Independent Living Program
3. State-Wide Career fair (on-going)
4. Implementation of a Transition Team
5. Inclusion of Parent Representative on Colorado Independent Advisory Council
6. Develop a Resource Bank of employed Visually Impaired and Blind
7.

8. _____

_____

9. _____

_____

10. _____

_____

B. Identify the criteria to be used to select your team's preferred strategies (e.g., "Will the implementation of this strategy provide the most effective starting point for addressing the team's chosen program?" or "Will the overall anticipated impact of this strategy justify the cost of implementation?")

1. Panel Presentation at VISERV

_____

2. Transition Team-Additional members-Student

Representative, Co.School for Deaf & Blind Representative;

3. and a Consumer representative not working in the

field of blindness. A representative of Independent

4. Living Accommodations

_____

5. _____

_____

6. _____

_____

C. Based on the criteria indicated above identify the preferred strategies you will use to implement your transition goal.

1. Panel Presentation at VISERV; A state wide program

consisting of workshops on Career Development,
Daily Living, and development of regional transition teams.

2. Develop a Summer Program to Offer Independent Living Skills; Career Awareness.

3.

4.

5.

D. For each of the strategies from the above discuss advantages and disadvantages. Based on your discussion, identify the strategy which your state team feels can be developed into a viable plan of action.

To expand and maintain the Colorado Transition Team to network other resources, agencies, and individuals to identify problems and implement the strategies.

Congratulations again! You have completed the second worksheet.

AMERICAN FOUNDATION FOR THE BLIND, INC. 15 WEST 16th STREET, NEW YORK, N.Y. 10011

STATE: Colorado

Chairperson: ~~John Herricon~~

Recorder: ~~Chuck Wright~~

Collaborative Planning
A Model Process for Developing a State-Wide Plan

Workshop #3: Developing an Action Plan

A. List all the major tasks necessary to implement your team's strategy (e.g., recruit people to conduct workshops, etc.)

1. Recruit other team members from identified groups
2. Disseminate material on objectives stated towards transition
3. Schedule future meetings of the Colorado Transition Team. Inclusion of Team members at Respective staffings.
4. To utilize up-coming conferences/meetings on Transition: ~~Febr.22 & 23-C-TASH-unc.Greeley;Feb.25 & 26 "Passages"~~
5. ~~Mar. 20 & 21-Region #8 Meet.on Transition,in Colorado~~ Springs, Denver,CO
6. ~~May 10 & 11-VISERV-"Learn to Earn" Longmont,CO~~
7. Team members will share all up-coming mailings with one ~~another involving Newsletters,Conferences,meetings,~~ and appropriate announcements.
8. Marketing the concept-Public Service Announcements
9. Utilize Chamber of Commerce; Service Clubs,etc.

B. Identify the order in which the tasks should be undertaken, and assign dates for initiating and completing each task.

	Date of Initiation	Date of Completion
Task 1		
#3-A		
#1-A Agenda Item		
	3/28/85	3/28/85
Task 2		
#4-A		
#6-A		
		5/11/85
Task 3		
Coalition on Handicapped		
Independent Advisory Council		
Directory of Employment		Dec. 1985
Task 4		
Task 5		
Task 6		

C. Select other possible members to be added to your state team (include addresses and telephone numbers if available)

1. To be determined at next Co Transition meeting.

2.

3.

4.

5.

6.

D. Describe how and when your team will monitor its activities (frequency of meetings, correspondence, conference calls, follow-up reports, etc.)

Initial meeting scheduled

Correspondence-Communication

Monthly for March, April, & May

E. Prepare an action plan with the following parts:

1. Description of the team, its members, its history, and its overall purpose.

2. Statement of the team's program focus (chosen in Stage One) with brief rationale.

3. Statement of the team's initial strategy (chosen in Stage Two) with brief rationale.

4. Statement of major tasks the team will perform and timetable (chosen in Stage Three).

5. Projected date for implementing the team's strategy.

ACTION PLAN

Part 1 Worksheet #1-A _____

_____

_____

_____

_____

Part 2 Worksheet #1-E _____

_____

_____

_____

_____

ACTION PLAN
(continued)

Part 3 #2-D

Part 4 #3-B

Part 5 #3-B

F. Determine next meeting date

March 28, 1985

G. Determine next meeting location

State Rehab. Center

Denver, CO

H. Individuals responsible for developing next meeting's agenda

John Morrison, et.al.

Congratulations! You have started the process. Please refer the Ferrini book during your future collaborative efforts.

AMERICAN FOUNDATION FOR THE BLIND, INC. 15 WEST 16th STREET, NEW YORK, N.Y. 10011

STATE: Kansas

Chairperson: Michael Byington

Recorder: Michael Byington

Collaborative Planning
A Model Process for Developing a State-Wide Plan

Based on: Ferrini, Matthews, Foster, Workman. The Interdependent Community: Collaborative Planning for Handicapped Youth. Technical Education Research Center, 44 Brattle Street, Cambridge, Massachusetts 02138

Worksheet #1: State Transition Needs and Goal

A. Team Members:

1. Chairperson's Name: Michael Byington

Title: Advocate/Case Manager

Address: 1119 W. 10th, Suite # 2

Topeka, KS 66604

Work Telephone: (913) 233-6323

Home Telephone: (913) 233-3839

Consumer	Byington	Education Specialist	Bartley
Parent	Frahm	Rehabilitation Specialist	Schutz

2. Name: Dr. Richard A. Schutz

Title: Director, Division of Services for the Blind

Address: 2700 W. 6th, Biddle Building

Topeka, KS 66606

Work Telephone: (913) 296-4454

Home Telephone: (913) 272-2343

Consumer		Education Specialist	
Parent		Rehabilitation Specialist	X

3. Name: Sheila Frahm

Title: Board of Education Member

Address: 18 Cottonwood, Route 3

Colby, KS 67701

Work Telephone: (913) 462-6942

Home Telephone:

Consumer		Education Specialist	
Parent	X	Rehabilitation Specialist	

4. Name: Mr. Ralph Bartley

Title: KS State School for the Visually Handicapped

Address: 1100 State

KS City, KS 66102

Work Telephone: (913) 281-3308

Home Telephone: (913) 621-2310

Consumer		Education Specialist	X
Parent		Rehabilitation Specialist	

5. Observers (names only)

a. Terry Regler

b. _____

c. _____

d. _____

e. _____

6. AFB Staff in Attendance (names only)

a. Judy Scott

b. _____

c. _____

B. Identify EXISTING COLLABORATIVE PROGRAMS/AGREEMENTS relative to transition (local and statewide), and indicate their level of implementation.

		Implementation	
		Partial	Total
1.	Ks. Plan for Deaf/Blind	X	
2.	Ks.State School for the Visually Handicapped/Ks. Dept. of Social & Rehabilitation on Services School to work Transition plan.	X	
3.	Division of Vocational Rehabilitation/ Independent Living Centers memorandum of understanding		xFor a small popula-tion.
4.			
5.			

C. List transition NEEDS identified within your state (for example, vocational training, career education, employment, transportation, housing, medical services, etc.)

1. Summer employment for blind and visually impaired youth.
2. Need for an easily updateable statewide information resource net facilitating early referrals to Vocational Rehabilitation/Services for the Blind and other adult services providers.
3. Earlier needs identification
5.
6.
7.
8.
9.
10.

D. Select three of the transition needs from the above list which your team has identified as the highest priorities for your state:

1. Same three as above

2. _____

_____

3. _____

_____

E. Develop a realistic goal for a state-wide transitional plan based, if possible, on your team's three prioritized needs.

Goal: Through a task force of manageable size, identify programs which are working well in the transitioning of visually impaired young adults and youth, and plan, fund, and adapt them as necessary to serve the total state-wide population of blind and visually impaired.

Congratulations, you have completed the first worksheet.

STATE: KS

Chairperson: Byington

Recorder: Byington

Collaborative Planning
A Model Process for Developing a State-Wide Plan

Worksheet #2: Choosing Strategies

A. Brainstorm a wide-ranging list of strategies that might be used to achieve the goal you identified in Workshop #1 (e.g. conduct workshops for teachers, rehabilitation personnel, employers, and parents on employment opportunities for multiply handicapped-visually impaired persons.)

1. Incremental planning-selling the programming as pilot testing for transitioning using the blind-in order to sell the real power brokers in the state on the concept. (Also recontact Gov.)
2. Make reports on this conference to the State Board of Education, the Consumer Advisory Committees of the Ks. Div. Services for the Blind and the Ks. St. School for the Visually Handicapped, and the open meeting of the Ks. Dept. of Social and Rehabilitation Services
3. Ask Ks. Legislature, Ways and Means Committee for a line item to fund Task Force desired to help complete transitioning process.
4. Get added to the Ks. State School for the V.H./Ks. Dept. of Social & Rehab. Services School to work Agreement, ~~extended budget increased to also fund above referenced task force.~~

5. Explore having first task force meeting in conjunction with training for vision consultant teachers in Sept.'85.

6. Survey and take advantage of existing services in developing collaboration agreements.

B. **Identify the criteria to be used to select your team's preferred strategies (e.g., "Will the implementation of this strategy provide the most effective starting point for addressing the team's chosen program?" or "Will the overall anticipated impact of this strategy justify the cost of implementation?")**

1. Share our goal and our three transitional top needs with a task force of 12 and ask for help with additional planning for collaboration and development of comprehensive agreements related thereto, and leading to implementation.

2. Do a conference call.

6.

C. **Based on the criteria indicated above identify the preferred strategies you will use to implement your transition goal.**

1. (We combined "C" and "D".

2. Conference Call between team members scheduled March 8,1985, 9:00 AM to be set up by Byington.

2. Schutz will get open meeting report in April report given by Commissioner Watson.

3. Byinton and Schutz will give report to Div.of Services for the Blind Consumer Advisory Committee Feb.20,1985

4. Bartley will report to Ks.St.School for V.H.Consumer Advisory Committee March 15th and also report to St.Board of Ed.

5. ~~Also,Bartley will check with Harold Hodges,Low Vision~~ Consultant,and attempt to obtain demographical information on the blind population in Ks. born 1964-1971 to see how many people we are talking about and how these people fit into Dr.Barraqa's four classes.

D. **For each of the strategies from the above discuss advantages and disadvantages. Based on your discussion, identify the strategy which your state team feels can be developed into a viable plan of action.**

6. Also this information will be sought for younger populations so we know what we can expect in the future.Shiela Frohm will also contact Betty Weilheis,St.Dept.of Ed. in reference to this information.

7. Tell Advisory Committee of A.F.B. we want copies of all state plans and all items used in presentations.

8. Byington will do recontact with Governor's office.

Congratulations again! You have completed the second worksheet.

AMERICAN FOUNDATION FOR THE BLIND, INC. 15 WEST 16th STREET, NEW YORK, N.Y. 10011

STATE: Ks.

Chairperson: Byington

Recorder: Byington

Collaborative Planning
A Model Process for Developing a State-Wide Plan

Workshop #3: Developing an Action Plan

A. List all the major tasks necessary to implement your team's strategy (e.g., recruit people to conduct workshops, etc.)

1. Explore summer only locations as satelites to state Randolph-Sheppard programming with eventual expansion of Randolph-Sheppard facilities into rural areas (Schutz and Byington).
2. Check into school credit for work by Handicapped students (Frohm.)
3. With the help of the task force, obtain necessary consulting services to facilitate knowledge of hardware and sofware used by key services and information providers both presently and potentially serving the visually impaired.

3.-1 Explore interface potentials.

B. Identify the order in which the tasks should be undertaken, and assign dates for initiating and completing each task.

	Date of Initiation	Date of Completion
Task 1		
Inform key persons and organizations about this effort and have meeting of this team.	Feb.20,'85 conference call Mar.8,85	Presentations through out Feb.,Mar.,and Apr '85
Task 2		
Recruit and develop task force	May '85	No later than Sept.' for first meeting
Task 3		
Task force Meeting	No later than Sept.'85	
Task 4		
Task 5		
Task 6		

Current team members will remain on

C. **Select other possible members to be added to your state team (include addresses and telephone numbers if available)**

1. Dean Prohoskas
   Vocational Education
2. Harold Hodges
   St.Vision Consultant
3. Youthful consumer member
4. ~~Gary Bishop~~
   ~~Special Ed.Coop.~~
   Dodge City,KS
5. Esther Taylor
   K.A.B.V.I.Inc.Education
   Committee Chairperson
6. Another parent.
7. Projects with Industry representative
8. ~~Angela Pratt~~
   ~~Wichita~~
9. ~~Dick Edlund~~
   KS.National Federation of Blind
10. Butch Bussen,Computer Consultant
    Wallace,KS

D. **Describe how and when your team will monitor its activities (frequency of meetings, correspondence, conference calls, follow-up reports, etc.)**

(See other sections.)
(chair will xerox copies of plan draft to Schutz,Bartley, and Frahm)
At the end of each conference call, (first one already scheduled) team will mutually agree on next conference call date and times other meetings as needed.

E. Prepare a action plan with the following parts:

1. Descr tion of the team, its members, its history, and i overall purpose.
2. State nt of the team's program focus (chosen in Stage ne) with brief rationale.
3. State nt of the team's initial strategy (chosen in Stage wo) with brief rationale.
4. State nt of major tasks the team will perform and timet le (chosen in Stage Three).
5. Proje ed date for implementing the team's strategy.

ACTION PLAN

Part 1 AFB eam of 4 expand to task force of 12 to 14.

Part 2 Se Worksheet #1, sheet 5 with Worksheet #1, sheet 4 iorities.

ACTION PLAN
(continued)

Part 3 Inform key players and fund task force

Part 4 Specific tasks and first reporting date, May 8,1985, have been established

Part 5 Feb. 20 starts strategy with presentation to the Consumer Advisory Committee of Services to the Blind

F. Determine next meeting date

Mar. 8 1985

G. Determine next meeting location

Wires of S.W.Bell or Atandt

H. Individuals responsible for developing next meeting's agenda

Byington/Much has already been done for this through these sheets.

Congratulations! You have started the process. Please refer the Ferrini book during your future collaborative efforts.

STATE: Michigan

Chairperson: G.Scholl

Recorder: L.Alonso

Collaborative Planning
A Model Process for Developing a State-Wide Plan

Based on: Ferrini, Matthews, Foster, Workman. The Interdependent Community: Collaborative Planning for Handicapped Youth. Technical Education Research Center, 44 Brattle Street, Cambridge, Massachusetts 02138

Worksheet #1: State Transition Needs and Goal

A. Team Members:

1. Chairperson's Name: Geri Dr.Geraldine Scholl

Title: Prof. of Education-U of Mich.

Address: 1400 Country Club Rd.

Ann Arbor, MI 48105

Work Telephone: 313-763-0650

Home Telephone: 313-761-3013

Consumer _____ Education Specialist X

Parent _____ Rehabilitation Specialist _____

2. Name: Joe (Joseph) A. Nemshak
   Title: Regional Supervisor
   Address: 309 N. Washington
   Lansing, MI 48909
   Work Telephone: 517-373-6425
   Home Telephone: 517-694-0940
   Consumer ____ Education Specialist ____
   Parent ____ Rehabilitation Specialist X

3. Name: Joan Hallem
   Title: Community Volunteer
   Address: 2602 Pinetree Dr.
   Flint, MI 48507
   Work Telephone: 313-767-5922
   Home Telephone: 313-742-1331
   Consumer X Education Specialist ____
   Parent ____ Rehabilitation Specialist ____

4. Name: Helen Konduros
   Title: Parent-Educator-Counselor
   Address: 44 Fontana Lane
   Grossee Pointe Shores, MI 48236
   Work Telephone: 313-494-2605 x350
   Home Telephone: 313-885-0158
   Consumer ____ Education Specialist ____
   Parent X Rehabilitation Specialist ____

5. **Observers** (names only)

a.	Carroll L.Jackson	Greater Det.Soc. for the Blind
b.	Marcus D.Benedetto	Sinai Hosp. Detroit
c.	Velma P.Allen	Mich.School f/t Blind
d.	Lu Alonso	Mich.State Univ.
e.	Elizabeth Lennon	Kalamazoo
f.	Laurie MacArthur	Service Center f/t Vis.Imp.
g.	Ivan Terzieff	Western Mich.Univ.

6. **AFB Staff in Attendance** (names only)

a.	Bob Esposito	Regional
b.		
c.		

B. **Identify EXISTING COLLABORATIVE PROGRAMS/AGREEMENTS relative to transition (local and statewide), and indicate their level of implementation.**

		Implementation	
		Partial	Total
1.	Michigan Interagency Delivery System for Voc.Ed.& Related Serv.f/t Hand.	X	
2.	Council of Agencies f/t Blind (Informal-S.E.Michigan	X	
3.	Career Educ.Day-G.D.S.B. (statewide)		X
4.	Center for Indep.Living Kalamazoo	X	
	GDSB-Detroit Pub.Sch.	X	
5.	Com.f/t Blind/MSB staff attend IEPCS for 16 yrs +	X	
6.	Low Vision/Sinai/Crip.Chn.Com. Statewide-Age 21 & below (1984) too early to assess		
7.	GDSB-Dev.Dis.Prof.Dev. on IEPs & IWRPS (SE Mich.)		X

C. List transition NEEDS identified within your state (for example, vocational training, career education, employment, transportation, housing, medical services, etc.)

1. Range of transitional services (training,resources, etc.) to all children esp. rural areas
2. Facilitate movement between residential and day programs.
3. Parent education on rights, responsibilities, resources, advocacy training-regional basis
4. Assessment of vocational skills; development of work-study opportunities;sensitize employers
5. Professional development on roles/responsibilities for parents and professions to be transition specialists
6. Parents/professionals work together on state-wide or regional levels to coordinate transitional services
7. Expansion of low vision services to all children (Sinai/Mich.Crp.Ch.Com.model)
8. Education of medical specialists re: resources etc. for closer collaboration
9. Resource center for technological,educational,vocational, etc. aids,materials,information,training of consumers, parents,professionals
10.

D. Select three of the transition needs from the above list which your team has identified as the highest priorities for your state:

1. Parent training for advocacy role responsibilities (3)

2. Assessment, work study, sensitize employers, etc. (4)

3. Collaborative arrangements, etc. (6)

4. Services, etc. for all children (1)

E. Develop a realistic goal for a state-wide transitional plan based, if possible, on your team's three prioritized needs.

Goal: Develop a comprehensive transitional service delivery system for all visually handicapped persons in Michigan.

Congratulations, you have completed the first worksheet.

STATE: Michigan

Chairperson: G.Scholl

Recorder: L.Alonso

Collaborative Planning
A Model Process for Developing a State-Wide Plan

Worksheet #2: Choosing Strategies

A. Brainstorm a wide-ranging list of strategies that might be used to achieve the goal you identified in Workshop #1 (e.g. conduct workshops for teachers, rehabilitation personnel, employers, and parents on employment opportunities for multiply handicapped-visually impaired persons.)

1. Develop strategies to work collaboratively with the Commission,MSB,MDE,Parents,Consumers,etc.
2. Appoint a Task Force to assign specific duties, set deadlines, etc.
3. Build a data base/inventory of existing services
4. Develop a listing of training schemes for transition
5. Involve parents & consumers; build advocacy through existing and new organizations
6. Conduct statewide workshop on transition through trainer of trainers model for regions
7. Conduct regional workshops on transition

8. Collaborate with career and vocational educational centers (regional & MSB) to get services for v.h.

9. Develop plans and procedures for utilizing MSB for specialized instruction (career,pre-voc,& voc.)

10. Develop means to include v.h. students in career and vocational education programs in the public schools

B. Identify the criteria to be used to select your team's preferred strategies (e.g., "Will the implementation of this strategy provide the most effective starting point for addressing the team's chosen program?" or "Will the overall anticipated impact of this strategy justify the cost of implementation?")

1. Provide most effective starting point and succeeding steps.

2. Can be done with limited resources

3. Possible to do by raising funds-self-supporting

4. Cost effective (cost/benefit analysis)

5. Greatest impact on greatest number of persons

6. Facilitates greatest degree of collaborative planning

C. Based on the criteria indicated above identify the preferred strategies you will use to implement your transition goal.

1. Identify Task Force (#2)

a. Develop strategies for working together (#1)
b. Build data base (#3)
c. Listing of training schemes (#4)

2. Organize parent group

3. Initiate contact with consumer groups

4. Plan and conduct state-wide workshop to train teams for regions (include CRCs)

5. Assist regional groups to plan and conduct workshops on transition programs

D. For each of the strategies from the above discuss advantages and disadvantages. Based on your discussion, identify the strategy which your state team feels can be developed into a viable plan of action.

1. Adv.-initiates action;highly visible
   Disad.-time to do it; credibility to function
2. Adv.-can be a force for implementation
   Disad.-time;getting parents motivated;recruiting leaders
3. Adv.-involved in implementation;help to promote services support activities of T.F.;identify needed services;be advocates
   Disad.
4. Adv.-facilitate regional structure/activities;strengthen numbers;efficient;develop interest in transition
   Disad.-costs money and time
5. Adv.-quality control of local programs;accountability; stimulate local action;broader base for action;more visibility;use of local media for publicity
   Disad.-money and time

Congratulations again! You have completed the second worksheet.

AMERICAN FOUNDATION FOR THE BLIND, INC. 15 WEST 16th STREET, NEW YORK, N.Y. 10011

STATE: Michigan

Chairperson: G.Scholl

Recorder: L.Alonso

Collaborative Planning
A Model Process for Developing a State-Wide Plan

Workshop #3: **Developing an Action Plan**

A. **List all the major tasks necessary to implement your team's strategy (e.g., recruit people to conduct workshops, etc.)**

1. Select & recruit task force members
2. Identify state parent leadership and contact NAPVI, NFB-M, and MAB for assistance in organizing
3. Identify state leadership and contact with NFB-M and MAB for collaboration
4. Contact local schools, IHEs, rehab. counselors, consumer groups to recruit school & college age student consumers
5. Contact SDE for cooperation from SESA and Voc.Ed.
6.

B. Identify the order in which the tasks should be undertaken, and assign dates for initiating and completing each task.

	Date of Initiation	Date of Completion
Task 1		
Contact SDE by letter	Feb.16	Feb.16
Follow-up personal contact	Feb.28	Mar.15
Task 2		
Select and invite representatives for Task Force	April 1	April 15
Task 3		
Contact NAPVI,NFB-M,ACB for organizing parents	April 1	Sept.1
Task 4		
Contact NFB-M and ACB for consumer (including student) input	~~April 1~~	~~Sept. 1~~
Task 5		
Set Task Force meeting and plan agenda	May 1	
Task 6		

C. **Select other possible members to be added to your state team (include addresses and telephone numbers if available)**

1. Lu Alonso 5/7/355-1871
331 Erickson Hall
Mich. State Univ.
E.Lansing,MI 48824

2. Velma Allen
517-373-9647
~~Michigan School for the~~ Blind
715 W.Willow
Lansing,Mich. 48913

3. Laurie Macarthur
Exec.Director
Service Center for Visually Impaired
725 Mason St.
Flint,MI 48503
313-235-2544

4. Ivan Terzieff 388-8020
Dept.of Blind Rehab.
Western Mich.University
Kalamazoo,MI 49081

5. Carroll L.Jackson
Greater Detroit Soc.f/t Blind
16625 Grand River Ave
~~Detroit,MI 48227 272-3900~~

6. ~~Debbie Livingston White~~

D. **Describe how and when your team will monitor its activities (frequency of meetings, correspondence, conference calls, follow-up reports, etc.)** cont.below

Employer

1.GSDB will set up a monitor system by computer.

2.Materials will be sent to members in advance

a.Carroll will send copies of forms to all

b.Each member will share and send materials on transition and employment that each has or knows about

c.Laurie will finalize date of meeting

d.Gerry will work with Carroll,Lu,Laurie to finalize agenda

3.Gerry will send letter to Director of Sp.Ed.

NFB: ACB

Vocational Educator Student Consumer:

Kevin Magin or George Mond

E. Prepare an action plan with the following parts:

1. Description of the team, its members, its history, and its overall purpose.

2. Statement of the team's program focus (chosen in Stage One) with brief rationale.

3. Statement of the team's initial strategy (chosen in Stage Two) with brief rationale.

4. Statement of major tasks the team will perform and timetable (chosen in Stage Three).

5. Projected date for implementing the team's strategy.

ACTION PLAN

Part 1 The team was expanded to include 10 additional members to insure adequate representation. ~~Its purpose is to direct and monitor the objectives selected to achieve its goal.~~

Part 2 The program focus will be to develop and expand transition services to all visually handicapped children in the state. At present, little is known about how many pupils are in need of such services.

ACTION PLAN
(continued)

Part 3 The initial strategy is to contact the SDE which was not represented here to secure cooperation and participation from special education and vocational education areas.

Part 4 ~~Forming the task force by April 1st~~
~~Contacting parent leadership and initiation official organization begin April 1st~~
~~Contact consumer groups to obtain participation by April 1st.~~

Part 5 ~~This will be determined at the May meeting when we~~ can assess progress to date.

F. Determine next meeting date

1st week in May 1985 all day. (Laurie will circulate possible times to all members)

G. Determine next meeting location

Flint-Service Center for the Visually Handicapped

H. Individuals responsible for developing next meeting's agenda

Scholl, Alonso,MacArthur,Jackson

(Tentative items were proposed)

Congratulations! You have started the process. Please refer the Ferrini book during your future collaborative efforts.

STATE: VIRGINIA

Chairperson: William Coppage

Recorder: Sue Nichols

Collaborative Planning
A Model Process for Developing a State-Wide Plan

Based on: Ferrini, Matthews, Foster, Workman. The Interdependent Community: Collaborative Planning for Handicapped Youth. Technical Education Research Center, 44 Brattle Street, Cambridge, Massachusetts 02138

Worksheet #1: State Transition Needs and Goal

A. Team Members:

1. Chairperson's Name: William Coppage

Title: Commissioner

Address: Virginia Department for the Visually Handicapped

397 Azalea Ave. Richmond, VA 23277

Work Telephone: (804) 264-3140

Home Telephone: (804) 288-5553

Consumer		Education Specialist	
Parent		Rehabilitation Specialist	X

2. Name: Theresa Ledwith

Title: Consumer

Address: 4600 Duke Street #623

Alexandria, VA 22304

Work Telephone: 703-525-3268

Home Telephone: 703-823-6741

Consumer X Education Specialist ____

Parent ____ Rehabilitation Specialist ____

3. Name: Glen Slonneger

Title: Va.Division f/t Visually Handicapped

Address: 397 Azalea Ave.,Richmond,VA 23227

804=264-3140

Work Telephone: ____

Home Telephone: ____

Consumer ____ Education Specialist X

Parent ____ Rehabilitation Specialist ____

4. Name: Sue Nichols

Title: Parent

Address: 1309 Frank Street

Norfolk,VA 23518

Work Telephone: ____

Home Telephone: 804-583-8065

Consumer ____ Education Specialist ____

Parent X Rehabilitation Specialist ____

5. Observers (names only)

   a. Willard Nichols

   b. Stuart Bowden

   c. Carter Hamlett

   d. Don Kinder

   e. _____

6. AFB Staff in Attendance (names only)

   a. Mary Ellen Mulholland

   b. Ed Ruch

   c. _____

B. Identify EXISTING COLLABORATIVE PROGRAMS/AGREEMENTS relative to transition (local and statewide), and indicate their level of implementation.

		Implementation	
		Partial	Total
1.	Collaborative Agreement between DVH ES/VR & Residential Schools		X
2.	ES contracts with school divisions to share I VT personnel costs		X
3.	State Department Ed/Voc Ed.memo of cooperation with DVH	X	
4.	DVH rehab.counselor assigned part-time at residential schools		X
5.	DVH/St.Dept.Ed. agreement for management of APH materials for youth in schools (ex:IRMC)		X

C. List transition NEEDS identified within your state (for example, vocational training, career education, employment, transportation, housing, medical services, etc.)

1. Need to develop greater independent living skills and support services for students at an earlier age
2. Transportation (to job)
3. Housing
4. Integrate the VI into occupational preparatory programs
5. Career education-especially VI specialist/school counselor cooperation
6. Assessment/aptitude testing as relates to employment/ vocational education
7. O & M specific to employment
8. Appropriate placement including job
9. Societal,familial & professional attitudes & expectations regarding career
10. Need to provide long-term support services & systems for those who will be dependent due to additional handicapping conditions.

D. Select three of the transition needs from the above list which your team has identified as the highest priorities for your state:

1. Need to develop greater independent living skills & support services for students at an earlier age

2. Career education-especially visually impaired specialist/ school counselor

3. Appropriate placement including job

E. Develop a realistic goal for a state-wide transitional plan based, if possible, on your team's three prioritized needs.

Goal: The goal is to develop a plan to assist all of Virginia VI youth to make an effective transition from school to a successful life via the following approaches:incorporating development of greater living skills & support services for students at an earlier age;providing career education-especially through VI specialist/school counselor cooperation;& creating awareness for appropriate preparation & placement to include job.

Congratulations, you have completed the first worksheet.

AMERICAN FOUNDATION FOR THE BLIND, INC. 15 WEST 16th STREET, NEW YORK,N.Y. 10011

STATE: VIRGINIA

Chairperson: William Coppage

Recorder: Sue Nichols

Collaborative Planning
A Model Process for Developing a State-Wide Plan

Worksheet #2: Choosing Strategies

A. Brainstorm a wide-ranging list of strategies that might be used to achieve the goal you identified in Workshop #1 (e.g. conduct workshops for teachers, rehabilitation personnel, employers, and parents on employment opportunities for multiply handicapped-visually impaired persons.)

1. Strengthen development of independent living skills through an awareness program for the LEA's,parents &VDVH employees
2. Develop more extensive contacts & cooperation with private & public community organizations (ie industry)
3. Broaden the scope & level of participation in INEP conference relative to optimal work-related performance
4. Develop independnent living skills through curriculum development,parent/family networks & the 2 residential schools & the rehab.centers
5. Access voc.ed.within the LEA's more extensively for VI-prod LEA to let VI students in & rehab to provide training/teaching assistance to LEA
6.
7.

8. _____

_____

9. _____

_____

10. _____

_____

B. Identify the criteria to be used to select your team's preferred strategies (e.g., "Will the implementation of this strategy provide the most effective starting point for addressing the team's chosen program?" or "Will the overall anticipated impact of this strategy justify the cost of implementation?")

1. cost

2. present level of availability of personnel

3. likelihood of success of program (feasibility)

4. speed of implementation

5. what will impact the greatest number of children?

6. What is currently being done

7. how effective are present efforts in the area

C. Based on the criteria indicated above identify the preferred strategies you will use to implement your transition goal.

1. Strengthen development of independent living skills through an awareness program for the LEA's, parents & VDVH employees

2. Develop more extensive contacts & cooperation with private & public community organizations (ie industry)

3. Broaden the scope & level of participation in IEP conference relative to optimal work-related performance

4. Develop independnent living skills thru curriculum development parent/family networks & the 2 residential schools & the rehab centers

5.

D. For each of the strategies from the above discuss advantages and disadvantages. Based on your discussion, identify the strategy which your state team feels can be developed into a viable plan of action.

To do parent/family networking in order to develop independent living skills, re ADL skills,decision-making skills, acceptance of responsibility, etc.

Congratulations again! You have completed the second worksheet.

AMERICAN FOUNDATION FOR THE BLIND, INC. 15 WEST 16th STREET, NEW YORK, N.Y. 10011

STATE: VIRGINIA

Chairperson: William Coppage

Recorder: Sue Nichols

Collaborative Planning
A Model Process for Developing a State-Wide Plan

Workshop #3: Developing an Action Plan

A. List all the major tasks necessary to implement your team's strategy (e.g., recruit people to conduct workshops, etc.)

1. Contact known parent groups for suggestions & input
2. Develop list of parents of VI youngsters in the state with addresses & phone numbers
3. Seek formal VDVH policy mandating rehab/ed services consultation re: placement objectives
4. Explore possibility of having regional ed services specialists consult with parent groups
5. Target one area in which to develop a parent group
6. Seek adult blind person(s)/other volunteers who will lead parent group(s)

B. Identify the order in which the tasks should be undertaken, and assign dates for initiating and completing each task.

	Date of Initiation	Date of Completion
Task 1 Contact known parent groups for suggestions/input	2/85	4/85
Task 2 Develop list of parents of VI students in state with addresses & phone numbers	2/85	4/85
Task 3 Seek formal VDVH policy mandating rehab/ed services consultation re: placement objectives	2/85	3/85
Task 4 Explore possibility of having regional ed services specialists consult with parent groups	2/85	2/85
Task 5 Target one area in which to develop a parent group	5/85	8/85
Task 6 Seek adult blind person(s)/ other volunteers who will lead parent group(s)	6/85	9/85

Task	Date of Initiation	Date of Completion
Task 7		
Rehab attend IEP conference of students over 14 years of age & follow up with parent contact	9/85	Ongoing
Task 8		
Mail to parents on list	8/85	10/85
Task 9		
Explore possibility of having rehab services consult with parent groups	2/85	10/85
Task 10		
Explore possibility of newsletter	10/85	--
Task 11		
Repeat parent group formation process in other areas	10/86	Ongoing
Task 12		
Reassess team composition	Present	Ongoing

C. Select other possible members to be added to your state team (include addresses and telephone numbers if available)

Ed.Services

1. Glen Slonneger,Director
   VDVH 397 Azalea Road
   Richmond,VA 23227
   804-264-3140

2. Michele Anikeef
   Dolly Madison Drive
   McLean,VA
   703-356-7587

3. Stuart Bowden,Principal
   Va.School for the Blind at Hamtpn
   700 Shell Road,Hampton,VA 23661
   804-247-2076

4. Donna Veno
   Quincy Drive
   Arlington,VA
   522-8366

5. SEA Personnel
   Jim Price or Deputee
   Richmond,VA

6. Carter Hamlett,Program Director
   VDVH 397 Azalea Road
   Richmond, VA 23227
   804-264-3140

D. Describe how and when your team will monitor its activities (frequency of meetings, correspondence, conference calls, follow-up reports, etc.)

1. Next meeting 4/30/85 10:30 AM
2. Interim reports to chairman by phone & correspondence
3. Further meetings scheduled so as to meet set dates for task completion

E. Prepare an action plan with the following parts:

1. Description of the team, its members, its history, and its overall purpose.
2. Statement of the team's program focus (chosen in Stage One) with brief rationale.
3. Statement of the team's initial strategy (chosen in Stage Two) with brief rationale.
4. Statement of major tasks the team will perform and timetable (chosen in Stage Three).
5. Projected date for implementing the team's strategy.

ACTION PLAN

Part 1 Team composed of professionals,consumers,parents originated from AFB 1985 Leadership Institute. Purpose is to work together to impact on one area of need related to transition from school to work by VI students

Part 2 Focus for effective transition in 3 main areas:living skills & support services;career education;appropriate preparation & placement. Focus derived from areas of current need identified within the group

ACTION PLAN
(continued)

Part 3 To develop awareness & support & to create influence through parent/family networking utilizing the two residential schools & the rehab center. The plan is feasible,practical & potentially effective & it can be be expanded upon

Part 4 Major tasks & completion dates 1. seek input of others 4/85 (2) Identify parents in state,4/85 (3) mandate rehab/ed services consult re: placement,3/85 ~~(4) Seek regional ed services/parent group consult.2/85~~ ~~(5) Target area for 1st parent group 8/85 (6)Seek parent~~ group leadership 9/85

Part 5 Accomplish initial organization of 1st parent group and complete corollary tasks by 11/85.

F. Determine next meeting date

April 30 1985

G. Determine next meeting location

VDVH 397 Azalea Road

Richmond, VA

H. Individuals responsible for developing next meeting's agenda

Carter Hamlett

Sue Nichols

Congratulations! You have started the process. Please refer the Ferrini book during your future collaborative efforts.

Appendix C

1985 Institute Team Members

STATE TEAM LIST, 1985

(In all cases the names are listed in this order: Rehabilitation, Education, Parent, Consumer.)

ARIZONA

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STATE BOARD OF EDUCATION AND SERVICES F/T BLIND
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STATE BOARD OF EDUCATION AND SERVICES F/T BLIND
170 RIDGE ROAD
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2540 EXECUTIVE CENTER CIRCLE WEST
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MICHIGAN

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DR. GERALDINE SCHOLL
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5.

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MINNESOTA

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